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Our quest as a firm is to nurture the presence of peace & joy in the lives of our clients through a holistic, intensely service-oriented and highly tailored approach—an approach that seamlessly combines the power of Comprehensive Financial Planning with the efficiency of a Coordinated Asset Management Program.



#### GETTING STARTED

**Comprehensive Financial Planning is the first step on the journey.**

Our work begins with an initial consultation. In this session, we discuss our approach to working with our clients, and engage in a review of your financial situation, and your objectives for the management of your wealth.

Let's Work Together

#### WHY BLUE WATER WEALTH?

**We care about our clients, and we work each day to tangibly express that caring in the form of our actions.**

We are based in the wonderful city of Portland, Oregon. As a reflection of our values, we provide our employees fully paid benefits and above-average wages. If you believe in the importance of equity in our society, then our values align with yours.

Our Approach

#### AREAS OF EXPERTISE

**Our areas of expertise include:**

- Retirement Planning
- Tax Mitigation Strategies
- Wealth Management
- Socially Responsible Investing
- Executive Compensation Optimization
- Stock Option Analysis
- Retirement Income Planning
- Estate Planning
- Multi-Generational Planning
- Charitable Giving



#### Our Clients' Journeys

11th century Hait-Ben-Haddou

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